



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

(1) Fourth and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney; and (3) for Distribution [Prob. C. 1860; 2620; 2623; 2630; 2942]

DOD: 7/25/2013		PUBLIC GUARDIAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Disbursement schedule shows receipts for loan to the estate of \$50,000.00 on 2/21/12 and another \$50,000.00 on 1/17/2013. Court may require clarification and terms of said loans. – <i>Minute Order dated 10/23/13 states Ms. Kruthers advised the Court that no money was loaned out by Ms. Enos, but rather money was loaned to her as a result of a reverse mortgage that ran out. Ms. Kruthers further advises that it was a standard contact believed to be with low interest.</i>
		Account period: 9/13/11 – 7/25/13	
		Accounting - \$1,151,592.63	
Cont. from 102313		Beginning POH - \$ 894,748.34	
	Aff.Sub.Wit.	Ending POH - \$ 886,795.79	
✓	Verified	Subsequent account: 7/26/13 – 8/13/13	
	Inventory	Accounting - \$892,876.04	
	PTC	Beginning POH - \$886,795.79	
	Not.Cred.	Ending POH - \$890,304.34	
✓	Notice of Hrg	Conservator - \$3,442.28 (3.46	
✓	Aff.Mail	Deputy hours @ \$96/hr and 6.70 Staff hours @ \$76/hr)	
	Aff.Pub.	Attorney - \$2,500.00 (per	
	Sp.Ntc.	Local Rule)	
	Pers.Serv.	Bond fee - \$202.04 (o.k.)	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections	Petitioner prays for an Order:	
	Video Receipt	1. Approving, allowing and settling the fourth and final account.	
	CI Report	2. Authorizing the conservator and attorney fees and commissions	
	9202	3. Payment of the bond fee	
✓	Order	4. Delivery of the property on hand, after payment of fees and costs to Bruce Brown as Executor of the Estate of Evelyn Enos, case no. 13CEPR00667.	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 11/22/13
			Updates:
			Recommendation:
			File 1 – Enos

Atty Kruthers, Heather H., of County Counsel's Office (for Public Guardian, Conservator)

Atty Wright, Janet L., of Wright & Johnson (Court-appointed for Conservatee)

Petition for Fees for Conservator and Her Attorney

Age: 89 years		PUBLIC GUARDIAN , Conservator of the Person and Estate appointed on 6/23/2009, is Petitioner. Petitioner states: <ul style="list-style-type: none"> Petitioner's First Account Current was approved on 1/5/2011, including dispensation of further accountings; all of the requirements of Probate Code § 2628(b) remain; The Conservator and her attorney have provided services to the Conservatee since August 2010 without receiving payment; this <i>Petition</i> is necessary since no accountings are due; Petitioner has expended a total of 7.65 Deputy hours @ \$96/hour and 11.00 Staff hours @ \$76/hour on behalf of the Conservatee (<i>Statement of Services Rendered</i> is attached as Exhibit A); entry dates cover the period of 8/28/2010 through 10/4/2013), for a total sum of \$1,570.40 as reasonable compensation for the Public Guardian's services; Petitioner requests \$900.00 for reasonable compensation for legal services provided by Petitioner's attorney, which equates to 6.0 hours of work over a 3-year period, including drafting this <i>Petition</i>; Petitioner seeks a lien against the estate of the Conservatee for any unpaid commissions and fees that can be paid as the Conservatee's funds build up. Petitioner prays for an order: <ol style="list-style-type: none"> Approving the amount requested for compensation to the Public Guardian for services rendered in conjunction with the conservatorship; Approving the amount requested for compensation to Petitioner's attorney for services rendered in conjunction with the conservatorship; and Court impose a lien against the estate for any authorized compensation to Petitioner and attorney. 	NEEDS/PROBLEMS/COMMENTS:	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: LEG
Reviewed on: 11/25/13
Updates:
Recommendation:
File 2 – Klomhaus

Atty Kruthers, Heather H., of County Counsel's Office (for Petitioner Public Guardian)

(1) Second Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2942]

Age: 75 years		PUBLIC GUARDIAN , Conservator of the Person and Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 8/6/2011 – 9/17/2013	Note: If the <i>Petition</i> is granted, Court will set a status hearing as follows:
Cont. from		Accounting - \$294,654.29	<ul style="list-style-type: none"> Friday, 9/18/2015 at 9:00 a.m. in Dept. 303 for filing of the third account.
	Aff.Sub.Wit.	Beginning POH - \$195,713.53	
✓	Verified	Ending POH - \$180,095.69 (<i>\$175,576.69 is cash</i>)	
	Inventory		
	PTC	Conservator - \$2,352.36 (<i>13.27 Deputy hours @ \$96/hr and 14.19 Staff hours @ \$76/hr</i>)	Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.
	Not.Cred.		
✓	Notice of Hrg	Attorney - \$1,250.00 (<i>less per Local Rule; \$1,250.00 per year for 2 years;</i>)	
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.	Bond fee - \$1,109.70 (OK)	
	Pers.Serv.		
	Conf. Screen	Costs - \$26.00 (<i>certified copy</i>)	
	Letters		
	Duties/Supp		
	Objections	Petitioner prays for an Order:	
	Video Receipt	1. Approving, allowing and settling the Second Account;	
✓	CI Report	2. Authorizing the Conservator and attorney fees and commissions;	
	9202	3. Authorizing payment of the bond fee and reimbursement of costs advanced.	
✓	Order		
	Aff. Posting	Court Investigator Jennifer Young's Report was filed 6/6/2013.	Reviewed by: LEG
	Status Rpt		Reviewed on: 11/25/13
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 3 – Campbell

Atty Kruthers, Heather H., of County Counsel's Office (for Petitioner Public Guardian)

(1) Second and Final Account and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

DOD: 8/22/2013		PUBLIC GUARDIAN , Conservator of the Person and Estate, is Petitioner. <u>Account period: 12/21/2011 – 8/22/2013</u> Accounting - \$22,264.89 Beginning POH - \$8,515.49 Ending POH - \$1,060.49 (all cash) <u>Subsequent Account period: 8/23/2013 – 9/18/2013</u> Accounting - \$4,064.91 Beginning POH - \$1,060.49 Ending POH - \$3,309.71 (all cash) Conservator - \$2,267.84 (17.29 Deputy hours @ \$96/hr and 8.00 Staff hours @ \$76/hr) Attorney - \$1,250.00 (less than per Local Rule of \$2,500 (\$1250/year for 2 years;)) Bond fee - \$50.00 (OK) (minimum for 2 years) Petitioner prays for an Order: 4. Approving, allowing and settling the Second and Final Account; 5. Authorizing the conservator and attorney fees and commissions; 6. Authorizing payment of the bond fee; and 7. Authorizing Petitioner to impose a lien on the estate for any unpaid balances of authorized fees and commissions.	NEEDS/PROBLEMS/COMMENTS:	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				Reviewed by: LEG Reviewed on: 11/26/13 Updates: Recommendation: File 4 – Garcia

Petition for Fees for Conservator and Her Attorney

Age: 93		<p>PUBLIC GUARDIAN, Petitioner, was appointed temporary Conservator of the Person on 04/08/13. Letters of Temporary Conservatorship were issued on 04/12/12 and extended to 09/17/13, when a permanent Conservator of the Person was appointed.</p> <p>Petitioner requests just and reasonable fees for services rendered as Temporary Conservator of the Person.</p> <p>Petitioner asks that they be paid from the Conservatorship estate for .5 staff hours @ \$76/hr. and 6.55 Deputy hours @ \$96/hr. for a total of \$666.80.</p> <p>Petitioner asks that their attorney, County Counsel, be paid from the Conservatorship estate for 2 hours @ \$150/hr. for a total of \$300.00.</p> <p>Services are itemized by date.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: JF	
			Reviewed on: 11/27/13	
			Updates:	
			Recommendation:	
			File 5 – Haney	

Atty Matlak, Steven M., of Dowling Aaron Inc. (for Petitioner Ronald Miller, Trustee)

Petition for Settlement of First Account Current and Report of Trustee; for Approval of Reimbursement of Petitioner's Out-of-Pocket Costs for Vacations and for Renovation of Petitioner's Main Bathroom for the Benefit of the Trust Beneficiary; for Approval of Attorney's Fees and Costs; and for Discharge of Bond Filed in Related Conservatorship Proceeding

Age: 47 years		RONALD MILLER , brother and Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 8/22/2012 – 8/31/2013	<p>1. <i>Petition</i> does not but should explain the nature of the disparity between the \$14,497.12 amount listed on Schedule A of the LISA SUSAN MILLER SPECIAL NEEDS TRUST (SNT), slated as the initial one-time payment to fund the SNT, versus the \$38,793.84 amount deposited into the SNT on 10/4/2012 identified as the initial benefit received from CalPERS. <i>Petition</i> should explain the \$24,296.72 additional funds initially deposited into the SNT.</p> <p>2. <i>Petition</i> does not but should explain the entry on Schedule D, Disbursements, of the \$10,753.00 for 2012 federal income taxes paid on 4/5/2013, which is seemingly disparate in comparison to the \$3,200.00 estimated federal income taxes for 2013. Need explanation and/or clarification.</p> <p align="center">~Please see additional page~</p>
		Accounting - \$59,485.35	
Cont. from		Beginning POH - \$0.00	
<input type="checkbox"/>	Aff.Sub.Wit.	Ending POH - \$36,834.39 (<i>all cash</i>)	
<input checked="" type="checkbox"/>	Verified	Trustee - waives	
<input type="checkbox"/>	Inventory	Attorney - \$1,167.50	
<input type="checkbox"/>	PTC	(<i>per Declaration and itemization filed 10/17/2013; 1.9 attorney hours; 8.5 paralegal hours;</i>)	
<input type="checkbox"/>	Not.Cred.	Attorney Costs - \$400.00	
<input checked="" type="checkbox"/>	Notice of Hrg	(<i>filing fees</i>)	
<input checked="" type="checkbox"/>	Aff.Mail	Bond - \$35,932.45 (<i>insufficient; Petitioner requests \$29,630.93 increase, for total bond of \$65,563.38;</i>)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Petitioner states:	
<input type="checkbox"/>	Pers.Serv.	<ul style="list-style-type: none"> The LISA SUSAN MILLER SPECIAL NEEDS TRUST (SNT) was established by Court ordered entered in the Conservatorship of the Person and Estate of Lisa Susan Miller (Case 0439065) on 8/22/2012, and was filed in this proceeding on 9/26/2012 (<i>copy of SNT attached as Exhibit A</i>); Due to the death of her mother, EVELYN C. MILLER, the SNT Beneficiary, Lisa Miller ("Lisa"), [<i>who is diagnosed with Down syndrome</i>], is entitled to receive payments of a survivor and death benefit from CalPERS; [<i>Schedule A, Receipts, shows CalPERS monthly benefits paid into the SNT of ~\$1,897.39 per month as of August 2013;</i>] 	
<input type="checkbox"/>	Conf. Screen	~Please see additional page~	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 11/26/13
			Updates:
			Recommendation:
			File 6 – Miller

Petitioner states, continued:

- Lisa is Petitioner's sister and lives with Petitioner and his wife rent free; because of Lisa's disability, she is unable to clean up after herself; Petitioner hired a housekeeper to clean house every two weeks, and split the cost between the 3 individuals residing in the house; based on that split, Petitioner is charging the SNT **\$120.00** every 6 weeks for Lisa's portion of the housekeeping charge;
- Petitioner has paid out-of-pocket for costs for the benefit of Lisa, for which the Petitioner requests he be reimbursed *[totaling **\$18,186.50**, as follows]*:
 - On 1/6/2013 through 1/13/2013, Petitioner and his wife took Lisa with them on a trip to Hawaii rather than leave her at home in the care of a paid caregiver, as Petitioner believed it was in the best interests of Lisa and beneficial for her mental health and physical well-being that she accompany Petitioner and his wife on the vacation; accommodations were made for Lisa's disability, and she spent 8 days with Petitioner and his wife in Hawaii, and Lisa had a wonderful time and enjoyed the vacation; *[itemization on Page 4 of Petition; expenses divided by 3 persons; Lisa's share of Hawaii trip totals **\$1,750.00**]*;
 - On 2/17/2013 through 2/24/2013, Petitioner and his wife took Lisa with them on a vacation trip to Cabo San Lucas, Mexico; again, rather than leave Lisa at home in the care of a paid caregiver, Petitioner believed it was in the best interests of Lisa and beneficial for her mental health and physical well-being that she accompany Petitioner and his wife on the vacation; accommodations were made for Lisa's disability, and she spent 8 days with Petitioner and his wife in Mexico; again, Lisa had a wonderful time and enjoyed the vacation; *[itemization on Page 4 of Petition; expenses divided by 3 persons; Lisa's share of Mexico trip totals **\$1,500.00**]*;
 - In April of 2013, Petitioner made accommodations for his sister Lisa's residency in his home with he and his wife by renovating the main bathroom in the house; the main bathroom is the bathroom used by Lisa and was renovated to increase accessibility for Lisa due to her handicap; the bathroom was enlarged, shower converted to walk-in shower, doors widened, counter top lowered, handicap toilet installed, and bathroom was re-tiled and re-painted; all in all, the bathroom was made handicap specific for the benefit of Lisa; *[itemization on Page 5 of Petition; expenses for bathroom renovation totals **\$14,936.50**]*;
- Petitioner posted a bond of **\$35,932.45** on 10/17/2012; based on the current **\$36,834.39** value of the SNT, and the estimated annual income to be earned of **\$22,768.68**, Petitioner requests the bond be increased in the amount of **\$29,630.93** for a total bond in the amount of **\$65,563.38**;
- There is currently a bond on file in the related *Conservatorship of the Person and Estate of Lisa Susan Miller* (Case 0439065) in the amount of **\$23,760.00** filed by Petitioner as Conservator of the Estate; all of the assets of Lisa Susan Miller, SNT Beneficiary and Conservee, have been deposited into her SNT; there are no assets in the Conservatorship Estate; Petitioner requests that the Court allow the discharge of the **\$23,760.00** bond filed in the related Conservatorship proceeding.

~Please see additional page~

Petitioner prays for an Order:

8. Approving, allowing and settling the First Account Current and Report of the Trustee;
9. Authorizing payment to the Trustee of **\$18,186.50** as reimbursement for out-of-pocket costs for vacations and renovation of the main bathroom in Petitioner's house paid on behalf of and for the benefit of Lisa;
10. Authorizing payment of the attorney fees to Dowling Aaron Inc. for legal services rendered and reimbursement of costs advanced in connection with this *Petition*;
11. Requiring the Petitioner as Trustee to file an additional bond in the amount of **\$29,630.93** [bringing total bond to **\$65,563.38**]; and
12. Approving for discharge the **\$23,860.00** bond filed in the *Conservatorship of the Person and Estate of Lisa Susan Miller* (Case 0439065).

NEEDS/PROBLEMS/COMMENTS, continued:

3. Petitioner requests reimbursement of the entire out-of-pocket costs totaling **\$14,936.50** that was paid for complete renovation of the main bathroom of the Petitioner's home for handicap accessibility, without providing justification for Petitioner's request that the SNT Beneficiary pay the entire amount of the renovation rather than a portion of the amount, given that the SNT Beneficiary does not own the home, and that the Petitioner and his wife may also utilize the renovated main bathroom of the Petitioner's home. While it is highly admirable that Petitioner and his wife share their home with the SNT Beneficiary, such renovation constitutes a significant and valuable improvement to any home, whether or not the occupants require handicap accessibility, and it appears the SNT Beneficiary may not be fairly responsible for the entire cost of the complete bathroom renovation.

Note: Court will set status hearings as follows:

- **Friday, January 10, 2014 at 9:00 a.m. in Dept. 303**, for filing of the increased bond; and
- **Friday, February 6, 2015 at 9:00 a.m. in Dept. 303** for the filing of the second account.

Pursuant Local Rule 7.5, if the documents noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.

(1) Report of Administrator of Insolvent Estate and (2) Request for Dismissal of Estate and for Final Discharge [Prob. C. 11600]

DOD: 01/15/09		PUBLIC ADMINISTRATOR , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states:	1. The Petition does not make a statement regarding the required Notice's under Probate Code § 9202(a) or (c) – to the Department of Health Care Services or Franchise Tax Board.
Cont. from		1. Petitioner was appointed Administrator by the Court per Minute Order dated 09/23/13.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	2. The Decedent died on 01/15/09. Petitioner was not provided with decedent's address.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	3. According to the Court file and docket, notice to creditors was duly given, published and filed as prescribed by law. No creditor's claims are reflected on the docket.	n/a
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	4. No Inventory & Appraisal was filed. The original petitioner, decedent's son, Joe Hogg, reported that before the decedent died she told him that she had an IRA that they were beneficiaries of. He reported that he believed his brother, Demetrius Augman, cashed out the IRA and divided the money between himself and his aunt. Mr. Hogg reported that she had an IRA at the IRS and several naval bases.	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.	5. The IRS reported that they were not able to provide any information. The only way an IRA could be cashed out was by the listed beneficiary.	w/
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	6. The Veterans Administration reported no IRA's for the decedent.	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	7. Decedent's son Demetrius Augman denied knowing anything about an IRA. He stated that his brother, Joe Hogg, had complete control of all the mail and the decedent's personal effects. He reported that Joe would know of an IRA.	09/23/13
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	8. Mr. Hogg reported to Petitioner that he remembered seeing something referencing an IRA a long time ago, but doesn't know where the information is currently. He also reported that there was a bank account and the monies had been distributed. He stated that the family was the beneficiary of the bank account. It appears that if there had been any assets, they were payable on death, and so not subject to probate administration. No assets were ever marshaled.	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		x
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Petitioner prays for an Order:	
		1. Settling, allowing and approving the final report as filed, and confirming and approving all acts of Administrator;	
		2. Dismissing the administration of this estate;	
		3. Discharging Petitioner as administrator.	
		Reviewed by: JF	
		Reviewed on: 11/27/13	
		Updates:	
		Recommendation:	
		File 7 – Crenshaw	

(1) First and Final Report of Executrix and Petition for Its Settlement; (2) for Allowance of Statutory Fees to Executrix and Attorney for Ordinary Services; (3) and for Final Distribution [Prob. C. 109500 et seq.]

DOD: 12/02/12		JANA L. TERRY , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. The Petition references an Inventory & Appraisal filed 12/07/12 in the amount of \$185,000.00. However, this matter wasn't commenced until 04/11/13, therefore nothing could have been filed on 12/07/12. Further, the first Inventory & Appraisal was filed in this matter on 06/07/13 showing a value of the estate to be \$175,000.00. It is unclear where the \$185,000.00 beginning property on hand figure comes from. Need clarification. It is also noted that the accounting appears to be based on the \$185,000.00 figure, therefore the accounting appears to be erroneous as well. 2. The calculation of attorney's statutory fees is based on a fee base of \$152,000, which the Petition states is the Reappraisal value. However earlier in the Petition, and as reflected on the Inventory & Appraisal filed 09/13/13, the reappraisal value of the estate is \$165,000.00. 3. The Petition, at paragraph 16, states that the Executor waives her compensation; however, the prayer requests that payment of statutory fees in the amount of \$5,560.00 be paid to Petitioner. Further, it appears that the amount to be distributed anticipates the statutory fee being paid to Petitioner. Need clarification. 4. Need declaration of current trustee of the Louise B. Hoak Trust pursuant to Local Rule 7.12.5.
		Account period: 12/02/12 – 10/11/13	
		Accounting - \$185,000.00	
		Beginning POH - \$185,000.00	
		Ending POH - \$141,040.22	
Cont. from		Executor - waives ??	
<input type="checkbox"/>	Aff.Sub.Wit.	Executor Costs- \$1,230.00 (filing fees, publication, certified copies, probate referee)	
<input checked="" type="checkbox"/>	Verified	Attorney - \$5,560.00 (less than statutory)	
<input checked="" type="checkbox"/>	Inventory	Costs - \$460.00 (certified letters and filing fees)	
<input checked="" type="checkbox"/>	PTC	Distribution, pursuant to decedent's will, is to:	
<input checked="" type="checkbox"/>	Not.Cred.	Jana L. Terry, Trustee of the Louise B. Hoak Trust - \$128,230.22	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 05/31/13		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: JF
Reviewed on: 11/27/13
Updates:
Recommendation:
File 8 – Hoak

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 15	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	JESSICA PICKINPAUGH , non-relative, is Petitioner.	
	Father: JASON BAKER – Consent & Waiver of Notice filed 08/28/13; Personally served on 08/10/13	
	Mother: TORI BAKER – Consent & Waiver of Notice filed 08/28/13; Personally served on 08/26/13	
Cont. from 092513, 103013, 111313	Paternal grandfather: DAVID BAKER – Served by mail on 08/20/13	<u>CONTINUED FROM 11/13/13</u>
Aff.Sub.Wit.	Paternal grandmother: TONI APPLEBEE – Served by mail on 08/20/13	Minute Order from 11/13/13 states: Ms. Ramirez requests a continuance to allow her client, Jessica Pickinpaugh who is unavailable today to be present.
✓ Verified	Maternal grandfather: DANIEL YOUNG – Served by mail on 08/20/13	
Inventory	Maternal grandmother: ROWENA SVILICH – deceased	
PTC	Siblings: KIMBERLY BAKER (13) – Served by mail on 08/20/13, TIMOTHY BAKER (11), ERICK MYERS, JR. (1)	
Not.Cred.	Petitioner states that she is friend of the mother. The minor has been living with Petitioner and is enrolled in high school. The mother is unable to provide a stable and safe home life.	1. Need proof of personal service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice for:
✓ Notice of Hrg		- Rebekah Baker (minor)
✓ Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.		
✓ Conf. Screen	Objection to Guardianship filed by mother, Tori Baker, on 09/05/13 states: that she no longer agrees with the Petitioner being appointed as guardian. Objector states that she has learned that the minor is often left unsupervised with an 18 year old male and that she is exposed to drugs and alcohol use in the Petitioner's home. Mother wants the minor to live with her (mother's) parents.	
✓ Letters		
✓ Duties/Supp		
✓ Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting	DSS Social Worker Irma Ramirez filed a report on 09/11/13.	Reviewed by: JF
Status Rpt	Court Investigator Julie Negrete filed a Supplemental Report on 11/07/13.	Reviewed on: 11/27/13
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice	Declarations in Support of Ms. Pickinpaugh's guardianship filed 11/13/13 by: 1) Jason Baker (adoptive father) – 2 declarations 2) Michael Svlich (family friend) 3) Jennifer Gatley (mother of a school friend of Rebekah) All declarations state that they support Ms. Pickinpaugh's guardianship petition. They all state that Rebekah appeared to be thriving in Ms. Pickinpaugh's care. Declaration of Tori Baker (mother) filed 11/13/13: supports the guardianship Petition of Daniel and Shirley Young and further states that Ms. Pickinpaugh uses drugs, alcohol and leads a sexually lewd lifestyle, alleging that Ms. Pickinpaugh attempts to or has sexual relationships with Ms. Baker's former boyfriends.	File 9A – Baker

Age: 15		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:	
		DANIEL YOUNG and SHIRLEY YOUNG , maternal grandfather and step-grandmother, are Petitioners. Father: JASON BAKER – Personally served on 10/13/13 Mother: TORI BAKER – Consent & Waiver of Notice filed 10/21/13 Paternal grandfather: DAVID BAKER – Served by mail on 10/11/13, Paternal grandmother: TONI APPLEBEE – Served by mail on 10/11/13, Maternal grandmother: ROWENA SVILICH - deceased Siblings: KIMBERLY BAKER (13) – Served by mail on 10/11/13, TIMOTHY BAKER (11) – Served by mail on 10/11/13, ERICK MYERS, JR. (1) Petitioners state that Rebekah is currently living with them and is going to school. The mother is unable to provide a safe and stable home. Rebekah's youngest sibling was placed with petitioners by CPS. Petitioners believe that Rebekah should be raised with her sibling. Court Investigator Julie Negrete filed a report on 10/18/13. Court Investigator Julie Negrete filed a Supplemental Report on 11/07/13.		CONTINUED FROM 11/13/13 Minute Order from 11/13/13 states: Ms. Ramirez requests a continuance to allow her client, Jessica Pickinpaugh who is unavailable today to be present. 1. Notice of Hearing filed 10/21/13 states that the hearing date is 10/11/13 at item 4(a); however the correct hearing date is 10/30/13. It is unclear whether the Notice of Hearing served to the persons entitled to Notice had the incorrect hearing date. Need revised <i>Notice of Hearing</i> with the correct hearing date with proof of service's reflecting that the persons entitled to notice were served with a Notice of Hearing with the correct hearing date.	
Cont. from 103013, 111313					
<input type="checkbox"/>	Aff.Sub.Wit.				
<input checked="" type="checkbox"/>	Verified				
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<input checked="" type="checkbox"/>	Notice of Hrg				
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<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input checked="" type="checkbox"/>	Pers.Serv.				
<input checked="" type="checkbox"/>	Conf. Screen				
<input checked="" type="checkbox"/>	Letters				
<input checked="" type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input type="checkbox"/>	Video Receipt				
<input checked="" type="checkbox"/>	CI Report				
<input type="checkbox"/>	9202				
<input checked="" type="checkbox"/>	Order				
<input type="checkbox"/>	Aff. Posting				
<input type="checkbox"/>	Status Rpt				
<input checked="" type="checkbox"/>	UCCJEA				
<input type="checkbox"/>	Citation				
<input type="checkbox"/>	FTB Notice				
			Continued on Page 2		
					Reviewed by: JF
					Reviewed on: 11/27/13
					Updates:
					Recommendation:
					File 9B – Baker

Court Investigator Julie Negrete filed a report on 11/12/13.

Declarations in Support of Ms. Pickinpaugh's guardianship filed 11/13/13 by:

- 4) Jason Baker (adoptive father) – 2 declarations
- 5) Michael Svlich (family friend)
- 6) Jennifer Gatley (mother of a school friend of Rebekah)

All declarations state that they support Ms. Pickinpaugh's guardianship petition. They all state that Rebekah appeared to be thriving in Ms. Pickinpaugh's care.

Declaration of Tori Baker (mother) filed 11/13/13: supports the guardianship Petition of Daniel and Shirley Young and further states that Ms. Pickinpaugh uses drugs, alcohol and leads a sexually lewd lifestyle, alleging that Ms. Pickinpaugh attempts to or has sexual relationships with Ms. Baker's former boyfriends.

Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 6/8/2013		<p>TANYA K. GOODSON, daughter/named executor without bond, is petitioner.</p> <p>Full IAEA – o.k.</p> <p>Will dated 10/27/2008</p> <p>Residence: Fresno Publication: Fresno Business Journal</p> <p>Estimated value of the estate: Personal property - \$16,200.00 Real property - \$0</p> <p>Probate Referee: Rick Smith</p> <p>There are two witnesses to the decedent's will. One of the two witnesses is the petitioner/sole beneficiary. Probate Code §6112 states unless there are at least two other subscribing witnesses to a will who are disinterested witnesses, the fact that the will makes a devise to a subscribing witness creates a presumption that the witness procured the devise by duress, menace, fraud, or undue influence. This presumption is a presumption affecting the burden of proof.</p> <p>Declaration of DJ Cumming filed on 10/8/2013 states she was present at the execution of the Will of Danny Wayne Goodman on 10/27/2008 (she is not one of the two witnesses). It is her understanding from the Decedent, that the circumstances surrounding his other two children were that Dannie Wayne Goodson, II is incapacitated and not an intended beneficiary, and that his other son, William Lee Goodson, was also not an intended beneficiary as he had not been in his life for over 30 years.</p> <p>Ms. Cumming states she does not believe that there was any duress, coercion, or undue influence imposed on Danny Goodson in connection with the execution of his will.</p> <p style="text-align: center;">Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Friday, May 9, 2014 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Friday, February 6, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
Cont. from 120413			
✓	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
✓	Aff.Mail W/		
✓	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Declaration of Gary Bagdasarian filed on 10/8/13 states he believes that Petitioner has rebutted the presumption that the interested witness herein, Tanya Goodson, procured the devise by duress, menace, fraud, or undue influence.

Age:		NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u> Order settling Twentieth Account filed 09/23/13</p> <p><u>Note:</u> A status hearing for filing of the 21st Account will be set as follows:</p> <ul style="list-style-type: none"> • Friday, 09/25/15, at 9:00 am in Dept. 303 	
DOD:			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF Reviewed on: 11/27/13 Updates: Recommendation: File 12 – Pasquale

Age: 13		<p>MANUEL ESPINOZA, Jr., father, is petitioner.</p> <p>RENEE SANCHEZ and MARCO SANCHEZ, paternal aunt and uncle were appointed guardians on 10/12/2010.</p> <p>Mother: MONICA SANCHEZ</p> <p>Petitioner states: he would like to ask the Court for visitation with his daughter. He states he was incarcerated during a difficult time in the child's life when Monica R. Sanchez, the mother, left the child with the uncle and aunt and never went back for her. Petitioner states he was released from prison on 01/16/2012, he was released off of probation on early terms due to good compliance and also completed a substance abuse class. Petitioner states he is currently employed, has a stable home and is also enrolling in a program to further parenting skills to become a successful parent. Petitioner is asking that the court further review his case and have discretion in his visitation. He states he understands the circumstances that brought forward the neglect of his daughter and for this reason he has not brought about anything to the court until he had a proper home for his daughter.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 10/16/2013: Parties agree to participate in mediation on 10/17/2013 at 1:30pm.</p> <p>1. Need Notice of Hearing with a copy of the petition at least 15 days prior to the hearing on the following:</p> <ul style="list-style-type: none"> • Renee Sanchez (Guardian) • Marco Sanchez (Guardian) • Monica Sanchez (Mother) 	
Cont. from 101613				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
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<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
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<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			x
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: LV</p> <p>Reviewed on: 11/21/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Espinoza</p>				

14 **Peggy Lucille Horn (CONS/P)**
Atty **Brewer, Donnie (pro per – nephew/Petitioner)**
Atty **Wright, Joyce (pro per – sister/Petitioner)**

Case No. 13CEPR00801

**Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820,
1821, 2680-2682)**

Age: 73		<u>TEMPORARY EXPIRES 12/04/13</u>		NEEDS/PROBLEMS/COMMENTS:		
		JOYCE WRIGHT , sister, is Petitioner, and requests appointment as Conservator of the Person. (Petition is not marked requesting medical consent powers, however, per CI report, Petitioner is requesting medical consent powers).		Court investigator advised rights on 10/08/13. Voting rights affected, need minute order. <u>Note:</u> A Petition was initially filed by Joyce Wright (sister) and Charlotte Tavares (niece) on 09/13/13. At the hearing on 10/21/13, Donnie Brewer (nephew), objected to the Petition. Mediation was held between the parties and it was agreed that the Petition be amended so that Joyce Wright and Donnie Brewer be appointed as Co-Conservators of the Person. Charlotte Tavares withdrew her petition on 10/28/13. Per CI report, on 11/08/13, Donnie Brewer stated that due to changes in circumstances he no longer wishes to go through with his Petition and does not want to remain as Co-Conservator. He states that he is in agreement that Joyce Wright be appointed as the sole conservator. Therefore, these notes are prepared based on the initial Petition filed by Joyce Wright and Charlotte Tavares, however, due to Ms. Tavares withdrawing, Ms. Wright is now the sole Petitioner.		
Cont. from		Declaration of Matthew Tatum, PsyD supports the granting of medical consent powers. Voting rights affected.				
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>	Petitioner states: The proposed conservatee suffered brain damage as an infant and is unable to care for herself and requires assistance of all activities of daily living. The proposed conservatee recently had a medical emergency and conservatorship is necessary to so that someone can make decisions on the proposed conservatee's behalf.			
<input checked="" type="checkbox"/>	Verified	<input type="checkbox"/>				
<input type="checkbox"/>	Inventory	<input type="checkbox"/>				
<input type="checkbox"/>	PTC	<input type="checkbox"/>				
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Aff.Mail	w/o				
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>				
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>				
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>	Conf. Screen	<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Letters	<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Duties/Supp	<input type="checkbox"/>				
<input type="checkbox"/>	Objections	<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Video Receipt	<input type="checkbox"/>	Court Investigator Dina Calvillo filed a report on 10/09/13.			
<input checked="" type="checkbox"/>	CI Report	<input type="checkbox"/>				
<input type="checkbox"/>	9202	<input type="checkbox"/>	Court Investigator Dina Calvillo filed a supplemental report on 11/26/13.			
<input checked="" type="checkbox"/>	Order	<input type="checkbox"/>				
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>				
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>				
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>				
<input checked="" type="checkbox"/>	Citation	<input type="checkbox"/>				
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>			Reviewed by: JF Reviewed on: 11/27/13 Updates: Recommendation: File 14 – Horn	

15 **Esperanza Reina Joya (GUARD/P)**
Atty **Darrough, Denise Yvonne (Pro Per – Petitioner – Non Relative)**
Atty **Darrough, Lynnard Lafette (Pro Per –Petitioner – Non Relative)**

Case No. 13CEPR00858

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 13		<u>TEMPORARY EXPIRES ON 12/04/2013</u>		NEEDS/PROBLEMS/COMMENTS:	
		DENISE DARROUGH and LYNNARD DARROUGH, non-relatives, are Petitioners.		1. Need Notice of Hearing.	
		Father: FRANK JOYA , Declaration of Due Diligence filed 09/27/2013		2. Need proof of personal service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:	
Cont. from		Mother: LISA JOYA – deceased		<ul style="list-style-type: none"> Frank Joya (father)- Unless the Court Dispenses with Notice 	
	Aff.Sub.Wit.		Paternal grandparents: UNKNOWN	Note: Declaration of Due Diligence filed 09/27/2013 states the father is unable to be located.	
✓	Verified		Maternal grandparents: UNKNOWN	<ul style="list-style-type: none"> Esperanza Joya (minor) 	
	Inventory			3. Need proof of service fifteen (15) days before the hearing of Notice of Hearing with a copy of the Petition or Consent & Waiver of Notice or Declaration of Due Diligence for:	
	PTC			<ul style="list-style-type: none"> Paternal Grandparents (Unknown) Maternal Grandparents (Unknown) 	
	Not.Cred.				
	Notice of Hrg	X			
	Aff.Mail	X			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	X			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report	X			
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
			Petitioners state that the minor is their daughter's best friend and the minor has spent a considerable amount of time in their home. Petitioners state that the father has stated that he can no longer care for the minor, his whereabouts are currently unknown. The minor's mother is deceased.		
			Attached to the petition is a letter from the father stating that he permits the minor to live with the petitioners indefinitely and that they are permitted to seek medical and legal attention pertaining to the child if needed.		
			DSS Investigator Irma Ramirez' report filed 11/21/2013.		
				Reviewed by: LV	
				Reviewed on: 11/21/2013	
				Updates: 11/22/2013	
				Recommendation:	
				File 15 – Joya	